MEETING MINUTES
For
RDU PMii User Group Meeting #6
(Prepared by Robert Stroup)

The Roadway Design Unit PMii User Group had its sixth meeting on November 15, 2006 in the Roadway Design Conference Room. The following group members were in attendance:

Ron Allen
Gary Lovering
Ron McCollum
Rekha Patel
Robert Stroup
Roger Thomas

The goal of the meeting was to review the minutes from the October meeting, discuss the status and any progress made in implementing short-term goals of the RDU PMii User Group, and provide status/progress updates on pending transactions.

A brief review of the meeting minutes for the October 4 Roadway Design PMii User Group meeting was held. Minutes have been posted to the Roadway Design Unit Website and are therefore approved.

- **Discuss Short-term goals/Status Update**

♦ **Discuss "tips and tricks with a FAQ section".**
   This item was tabled until the next meeting. Ron Allen stated that Greg told him there are not many comments from the "folks on the floor" and that he will have information at the next User Group meeting.

♦ **Discuss standardized Roadway guidelines.**
   This item was tabled until the next meeting.

♦ **Status of Forecast Aging Report** – Ron Allen (with Jimmy Norris, Gary Lovering, Rekha Patel, Ron McCollum, Greg Brew)
   Due to a bug in the system with "CJ20N-rescheduling" populating the Forecast Aging field incorrectly (when the whole project is rescheduled, not just a particular network), Hanumanth Surampudy stated that SAP transaction CJ2B should be used to perform rescheduling of projects. CJ2B will populate the Forecast Aging field correctly.

♦ **Barchart Demo** – Gary Lovering
   The only items currently read for the creation of the barchart are TIP number and milestone. In the future the barchart will contain project description, WBS number, post-year projects, etc. For more details see the attached "Barchart Setup and Creation of Barcharts" by Gary Lovering.

♦ **Barchart Printing** – Gary Lovering/Robert Stroup
   Not discussed.

♦ **Demo of transaction CJ2B** – Jimmy Norris (not in attendance), demo by Gary Lovering
   Transaction CJ2B (Change Project Planning Board) opens the Project Planning Board without having to enter the Project Builder. Projects will be opened to the level specified by the options settings in CJ20N.   The Planning Board always returns you to dates settings that you last used; therefore, a big advantage of using CJ2B is that you can always enter PMii in the forecast mode if you desire.

   Transaction CJ2B should be used to reschedule projects (see "Status of Forecast Aging Report" above for more details). This transaction should be used with 'PPB Profile with Federal Fiscal Yr' in the 'Plan.board prf' field (you can change the profile for state funded projects if you desire).

   Milestones are not shown in the correct color (as in CJ20N Project Planning Board).

Workaround: *Select All, Hide Milestones, Show Milestones. Milestones will now display in the correct color.*

Transaction CJ2C (Display Project Planning Board) is also available.

♦ **Status of transaction ZPSR28** – Jimmy Norris
  This item was tabled.

♦ **Discuss upcoming PMii User Group meeting (November 20th) – issues/recommendations?**
  Ron Allen will discuss Basic versus Forecast schedules to ensure everyone is working towards the Basic Schedule while maintaining the Forecast Schedule.

♦ **List of transactions that are functional and available.**
  This item was not discussed.

• **General discussions**

♦ E-mail group name for the User Group (i.e. rdypmii@dot.state.nc.us), or do we have one already? **Robert will talk to Jim McMellon.** *This e-mail group name will be for communication among the User Group members and for Roadway Design personnel to communicate with the User Group.*

• **Future Agenda Items?**
  Items that were tabled in this meeting should be placed on the agenda for the next Roadway Design Unit PMii User Group meeting.

Barchart Setup and Creation of Barcharts

Load Files and Setup For Barchart
1) Open S:\Share\Bar Charts\Setup for Pmii ExcelRepor.zip…..Extract all files to C:\
2) Run C:\Debug\Pmii Excel Report setup Wizrd.msi (place files in C:\Program Files\Pmii Excel Report)
3) **Important**: Replace file C:\Program Files\PMii Excel Report\PMii Excel Report.exe   (file date 9/19/06)
                     with file S:\Share\Bar Charts\Pmii Excel Report.exe   (file date 10/15/06)

This completes the setup for the Barchart .

You will need a list of all WBS's for each of your workcenters.
If you do not have a list run ZPSR24 and save the WBS numbers in EXCEL.

<u>To Create Barcharts for each squad:</u>
1)   Open Pmii Report ZCNS53
2)   *Get Variant created by GLOVERING….4CASTGL (Forecast Dates) or BASICGL (Basic Dates)
          Use Dynamic Selection to weed out unwanted Complex Projects. *(always load variant prior to adding WBS numbers)*
3)   Add your list of WBS numbers from ZPSR24…or your own list from a worksheet…..Execute
4)   Export to Spreadsheet XXL…..Table…..Micro Excel.
5)   Delete Column A and B
6)   Save Copy As…C:\Debug\squad name.txt
7)   Run Desktop Icon "Shortcut to Pmii Excel Report"
8)   **Set Workdays….# of Years…PE….Squad….**then**…..Open C:\Debug\squad name.txt….hit New
9)   YOU SHOULD HAVE A BARCHART……maybe
10)   Save As C:\Debug\squad name.xls
11)   **To print barchart** see S:\Share\Bar Charts\Print Barchart Script.doc

*Variant 4CASTGL (Forecast Dates) or BASICGL (Basic Dates) is temporary but has all you will need at this time. Jimmy Norris will be setting up a Global Variant with the final milestones agreed upon by the RD PMii User Group. He will notify Rdy Co-Pm's of the new variant name once complete. The new Global Variant can be used as is or customized by the Co-Pm's to add or delete milestones and can be saved under your own name.

**If you want a blank row for Workdays on your barchart as in the old PAWS program turn Workdays on, if not, don't.
  You will have to enter the actual workdays in your barchart by hand.